

**U.S. Department of Veterans Affairs**  
**Supportive Services for Veteran Families (SSVF) Program**



**Homelessness Prevention and Rapid Re-Housing**  
**Best Practice Standards:**  
***Fidelity Self-Assessment Tool***

**April 2013**

## About this Tool

This is a structured self-assessment and quality improvement tool offered to grantees receiving funds from the U.S. Department of Veteran Affairs to implement the Support Services for Veteran Families program. Grantees may choose to utilize this tool to self-assess, for their own purposes, their program's fidelity to the national SSVF program model and its best practices. The tool gives individual grantees a framework for mapping needed steps towards increased quality and alignment with national standards.

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## Introduction

### Purpose of Fidelity Scales and Self-Assessment

The VA strives to promote best practices among SSVF grantees related to what works in homelessness prevention and rapid re-housing programs. Toward that end, SSVF grantees are encouraged to review and, to the best of their ability, adhere to best practice standards identified for SSVF. The fidelity scales included in this tool may be used independently by grantees to assess the degree to which their program adheres to each standard and identify areas for quality improvement. Programs can use this tool over time to gauge improvements and avoid unintended loss of fidelity over time.

### Using the Tool

SSVF grantees are encouraged to utilize the Fidelity Self-Assessment Tool on a regular (e.g. annual basis) as part of agency and program continuous quality improvement processes and whenever significant program changes have been made or are being planned. Grantees may form an internal working group to assess the program, with one lead staff member, and may find it beneficial to include staff members of different disciplines from within the program or from other grantee programs. Multi-disciplinary review teams may provide a more accurate reflection of the program's current and potential fidelity. The group may also find it useful to solicit input from program participants and external stakeholders to inform fidelity scores and/or develop plans for increasing fidelity scores.

This tool is designed to allow grantees to:

1. Assess fidelity to each standard by assigning a score

2. Identify which standards are a priority for quality improvement efforts
3. Establish a plan for quality improvement
4. Compare current scores with previous assessments to track improvements in fidelity over time.

Grantees may also find it useful to summarize their level of consistency with each standards, each section of the standards, and/or the standards overall prior to establishing a plan for improvement. As with any quality improvement plan, goals are most effective when prioritized and when they include specific actions, timeframes, intended outcomes, and staff responsibilities. After using the tool several times, it is possible to chart progress on individual standards and overall progress within each practice area. An example quality improvement plan and a sample charting of improvement across multiple ratings is provided in the appendix.

### Applying a Score

The tool includes a scale for scoring each standard. The scale ranges from five, the highest fidelity, to one, the lowest fidelity. Higher fidelity indicates the program has practices that more closely match the practice described in the standard. The following general guideline should be used when identifying a score:

Fidelity Scale				
1	2	3	4	5
Program does not meet the standard		Program partially meets the standard		Program fully meets the standard

## Fidelity Self-Assessment Tool

These standards are organized according to the following five practice areas and, unless otherwise noted, are applicable to both homelessness prevention and rapid re-housing programs.

- I. Outreach, Engagement and Admission
- II. Assessment and Housing Plan
- III. Participant Services, Non-Financial
- IV. Participant Services, Financial Assistance
- V. Landlord Supports

**Key:**

PPP: Policies, Procedures and Practices

STS: Staff Training and Supervision

PQI: Performance and Quality Improvement

**Program Name:** \_\_\_\_\_

**Assessment Date:** \_\_\_\_\_

**Person(s) Completing Assessment:** \_\_\_\_\_  
**(name, title or role)**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## I. Outreach, Engagement and Admission

### A. Targeting, Eligibility and Prioritization Criteria

**Approach:**

The program's target population and associated eligibility and prioritization criteria are informed by local data and focus on un-served or underserved persons and households who lack other available and appropriate housing options, financial resources, and supports sufficient to prevent or end literal homelessness.

	Type	Standards	Fidelity Score (Scale 1-5)	Priority for Improvement (high, medium, low)
IA1	PPP	The program has an eligibility policy that describes the eligibility and prioritization criteria for the program's target population(s), including use of the <i>SSVF Homelessness Prevention Eligibility Screening Disposition Form</i> , and that is consistent with these standards.		
IA2	PPP	The program actively participates in local Continuum of Care (CoC) planning and coordination and collaborates with the CoCs and the VA Network Homeless Coordinator(s) in their service area to: 1. Identify un-served or under-served populations; and, 2. Define the program's target population.		
IA3	PPP	[Homelessness prevention programs only] Eligibility and prioritization criteria are based on local and, when relevant, national data to target households at the highest risk of homelessness.		
IA4	PPP	Eligibility criteria include the absence of other housing options, financial resources, and supports sufficient to prevent or end literal homelessness (i.e., criteria to screen-in applicants who "but for" the program's assistance would become or remain literally homeless).		
IA5	PPP	The program has defined additional prioritization criteria that enable the program to assign higher or lower priority to applicants, particularly where the volume of requests for assistance from eligible households exceed program resources.		
IA6	PPP	Eligibility and prioritization criteria do not include factors, such as minimum income, skills, or ability to obtain or maintain employment, that are designed to screen out applicants who are predicted to fail in permanent housing.		
IA7	PPP	Eligibility criteria and priorities are designed to ensure that the program is an equal or better match than other available community resources that are acceptable to the applicant.		
IA8	STS	Staff at all levels understand and can describe the program's target population, eligibility criteria, and priorities.		
IA9	STS	Staff have appropriate experience and training in understanding and applying the situations and characteristics of the program's targeting criteria and priorities.		

IA10	PQI	Data is tracked to determine whether the targeting criteria and priorities, as applied, result in correctly identifying and admitting the target population.		
Total				

## B. Outreach and Engagement

### Approach:

The program has a plan for locating and engaging with the target population that includes both direct contact with homeless and at-risk populations and timely response to referrals from homeless, human service and mainstream resources. Outreach and engagement practices are targeted, proactive and client-centered, with particular attention to finding and engaging with persons in crisis who may be initially reluctant to accept assistance. Some or all outreach may be provided by other agencies (e.g., homeless street outreach, centralized point of assessment and triage). Where this is the case, the program has a plan to work with outreach agencies or other assessment/triage points to efficiently link prospective participants to the program, including successfully connecting with persons experiencing a housing crisis who are not involved with any community agency.

	Type	Standards	Fidelity Score (Scale 1-5)	Priority for Improvement (high, medium, low)
IB1	PPP	The program has policies and procedures for outreach and engagement practices and they are consistent with these standards.		
IB2	PPP	The program's outreach plan and efforts include regular and event-based staff presence at locations where prospective program participants camp, sleep, visit and/or receive homeless or other assistance, including VA Medical Centers and other VA and mainstream services in the local area, including when the program works with another agency that provides outreach or serves as a point of assessment and triage.		
IB3	PPP	Program staff engage in specific informal or formal coordination efforts with VA Medical Centers, local homeless assistance providers and mainstream providers to identify and refer prospective clients.		
IB4	PPP	The program conducts outreach and actively seeks to engage persons who may need relationship-building to accept assistance, including multi-encounter outreach and engagement strategies.		
IB5	PPP	The program designates the staff person who has developed a relationship with persons reluctant to accept assistance to be that person's case manager and/or successfully transfers that relationship to a different staff person for case management.		
IB6	PPP	Where the program is working with a separate outreach provider or other assessment/triage providers who has developed a relationship with the client, the program seeks to coordinate with that provider to transfer the relationship to the program staff as part of the case transfer process.		
IB7	PPP	[Homelessness prevention programs only] The program coordinates with local homeless shelters to ensure persons who could be diverted from shelter are able to quickly access program homelessness prevention assistance.		
IB8	PPP	[Rapid re-housing programs only] The program coordinates with local homeless shelters and street outreach providers to ensure persons who are homeless quickly access program rapid re-housing		



		assistance.		
IB9	STS	Staff have appropriate experience and training in program screening requirements, tools and related policies and procedures to provide outreach and an initial screening of potential eligibility.		
IB10	STS	Staff have experience and training in outreach and engagement strategies, including engagement with persons who are in crisis and persons who are reluctant to accept assistance.		
IB11	STS	Supervisors utilize training, coaching, observation and monitoring to assure that outreach is effectively reaching and engaging prospective program participants.		
IB12	PQI	Outreach efforts to VA Medical Centers, homeless services and community resources and the referrals from those resources are tracked to determine the effectiveness of outreach.		
IB13	PQI	Homeless assistance and other community and mainstream assistance providers, including VA Medical Centers, are periodically surveyed to determine obstacles to referrals and how those obstacles might be overcome.		
<b>Total</b>				

## C. Screening and Program Admission Determination

### Approach:

Eligibility screening and admission decisions are made consistent with program eligibility and prioritization policies and funder requirements. The screening assessment accounts for each applicant's presenting housing crisis and whether the program is the most effective, available, acceptable method of resolving an applicant's housing crisis. Households admitted to the program would have become or would have remained literally homeless "but for" program assistance.

	Type	Standards	Fidelity Score (Scale 1-5)	Priority for Improvement (high, medium, low)
IC1	PPP	The program has policies and procedures for screening and admission processes, including step-by-step guidance for staff who make program admission decisions, and they are consistent with these standards.		
IC2	PPP	Program screening assessment tools provide a brief, efficient means: 1. For gathering information about eligibility and prioritization consistent with the program's eligibility and prioritization criteria, including the applicant's current housing crisis; or, 2) To refer the applicant to a different program that is <b>appropriate</b> , <b>available</b> , and <b>acceptable</b> to the applicant household and able to provide at least equally <b>effective</b> assistance.		
IC3	PPP	[Homelessness prevention programs only] Applicant screening results are documented using the <i>SSVF Homelessness Prevention Eligibility Screening Disposition Form</i> .		
IC4	PPP	Staff confirm via written and/or oral documentation (as program procedures and funder requirements indicate) the <i>lack</i> of available and appropriate housing options, resources, and supports that could help the applicant avoid literal homelessness or end their literal homelessness.		
IC5	PPP	[Homelessness prevention programs only] The program is able to intervene and prevent literal homelessness when applicants are discharged from institutions without a plan to avoid literal homelessness.		
IC6	PPP	[Homelessness prevention programs only] The program expedites screening and admission decisions in situations where there is a more imminent risk of literal homelessness.		
IC7	PPP	The program maintains an updated guide of all relevant community resources. Staff are knowledgeable about and assist applicants navigate other community resources and service systems, including other programs able to resolve housing crises that may be appropriate instead of or in addition to assistance offered by the program.		
IC8	STS	Staff have appropriate experience and training in the use of program screening tools and related policies and procedures, including understanding the impact of housing crises and homelessness on how people respond to crisis and present for assistance, approaches to quickly assess and determine whether an applicant should be admitted to the program, and available alternative community and VA resources. Staff		

		facilitate conversations and ask questions in a respectful manner that elicits information necessary to determining eligibility and need for services.		
IC9	STS	Supervisors utilize training, coaching, observation and monitoring to assure screening and program admission processes occur according to program policies and procedures. Supervisor is available for individual case consultation.		
IC10	PQI	The program conducts periodic audits of case files to assure that screening and admission determination and documentation requirements are met and are being conducted in a manner consistent with program policies and procedures.		
IC11	PQI	The program tracks data on applicants who were not accepted for assistance, to determine the effectiveness of outreach and screening and the need for additional staff training. Data includes why applicants were not assisted, where they were referred from and to where they were referred.		
<b>Total</b>				

## II. Assessment and Housing Plan

### A. Assessment

#### **Approach:**

The assessment process is progressive, in that participant assessment and information gathering occurs when appropriate and relevant to program service delivery and referral decisions and does not gather unnecessary information. Information gathered through assessment focuses on the participant's immediate housing crisis, emphasizing the participant's strengths and barriers as these relate directly to obtaining or maintaining housing. Disabilities and other issues are only considered if they are demonstrably related to the current housing crisis or otherwise relevant to target population and services provided by the program. Assessment of relevant housing barriers is focused on "tenant screening" barriers and "housing retention" barriers. Tenant screening barriers include employment, rental and criminal history, and other factors that would cause a landlord to reject a tenant's application for housing. Housing retention barriers include lack of information and/or skills related to: tenant rights and responsibilities, lease compliance, timely payment of rent, unit upkeep, and meeting any broad tenant behavior clauses in the lease.

	Type	Standards	Fidelity Score (Scale 1-5)	Priority for Improvement (high, medium, low)
IIA1	PPP	The program has policies and procedures that describe the program's assessment process and they are consistent with these standards.		
IIA2	PPP	The program assessment process gathers participant information in a progressive manner and only when timely, relevant, and necessary to determine what program services to offer a participant and/or to determine what other community resources a participant may be referred to. The assessment process may involve home visits, over time, rather than assessing all housing retention barriers at once, shortly after program intake.		
IIA3	PPP	The program assessment tool includes questions to determine participant's immediate risks to health or safety, tenant screening and housing retention barriers, housing needs and preferences, and any other information necessary to address the immediate housing crisis and establish a housing plan.		
IIA4	PPP	For participants who need re-housing (if literally homeless) or relocation (if at-risk of literal homelessness), the program assessment collects information relevant to identifying tenant screening barriers and to determining a strategy for locating and securing rental housing.		
IIA5	PPP	For all participants, the program assessment collects information relevant to identifying housing retention barriers and to determining what education or supports might be needed to overcome barriers.		
IIA6	PPP	Other physical and behavioral health conditions are assessed only if and when it becomes evident that such conditions are directly related to obtaining or retaining housing.		

IIA7	STS	Staff have appropriate experience and training in the use of program assessment tools, approaches to assessing housing barriers and participant-oriented engagement practices, and the program's related policies and procedures.		
IIA8	STS	Supervisors utilize training, coaching, observation and monitoring to assure staff conduct assessments according to program policies and procedures. Supervisor is available for individual case consultation.		
IIA9	PQI	The program conducts periodic audits of case files to assure that participant assessment is being conducted in a manner consistent with program policies and procedures.		
<b>Total</b>				

## B. Housing Plan

### Approach:

A Housing Plan is developed for each participant household following assessment. The Housing Plan is periodically updated and, for participants receiving more than one-time assistance, at program exit. The Housing Plan is developed in partnership with the participant and includes the participant's goals, strengths and preferences; addresses critical housing retention barriers; and is reasonable and realistic in scope, recognizing the general difficulty people have making multiple, simultaneous life changes. The initial Plan addresses the participant's immediate housing crisis and any risks to health and safety while subsequent Plans address obtaining and/or maintaining permanent housing. Participants exiting the program are assisted in developing a Plan that addresses actions a participant will take to achieve greater stability or minimize the chance of a return to housing instability and crisis in the near term. Where the plan includes referrals to community resources, the goal is, to the greatest extent possible, to inform the participant about resources, then coach and assist him/her to self-advocate for access to resources s/he wants to obtain.

	Type	Standards	Fidelity Score (Scale 1-5)	Priority for Improvement (high, medium, low)
IIB1	PPP	The program has policies and procedures that describe the program's process for creating Housing Plans with participants, including guidelines for developing "reasonable" goals and action steps, and they are consistent with these standards.		
IIB2	PPP	The program's Housing Plan tool includes space to identify housing related goals, housing-related strengths (skills, knowledge, and experience), action steps, action step timeframes, action step responsibility, the date the plan was developed or updated, and signature lines for both staff and participants. The tool has space to indicate whether the Plan is an initial, update (during the program), or final Plan.		
IIB3	PPP	Housing Plans are developed in partnership with the participant, account for participant preferences/choices, and include only goals agreed to by the participant.		
IIB4	PPP	Housing Plans are informed by the participant assessment; are reasonable relative to participant choice, needs, abilities, and history; account for local housing and employment markets, and include actions to maximize participant's ability to pay rent—including any increases necessary when the program's temporary financial assistance ends.		
IIB5	PPP	Housing Plans do not generally assume or require rapid, significant increases in participant income or skills, or multiple, simultaneous behavioral changes.		
IIB6	PPP	Initial Housing Plans focus on resolving the immediate housing crisis and any other crises that threaten participant health and safety.		
IIB7	PPP	Subsequent Housing Plans focus on obtaining and retaining housing, including referrals to other community-based or mainstream resources, if and when program participants agree.		
IIB8	PPP	Final Housing Plans include any goals/actions the participant agrees to pursue beyond case closing, with an		

		emphasis on further increasing housing stability. Plans identify potential actions and resources that the participant has agreed may be needed and likely to prevent or respond to future housing crises.		
IIB9	STS	Staff have appropriate experience and training in program approach to developing Housing Plans, including: how to use participant input and preferences in Housing Plans and service delivery; how to recognize and respond to the ability/inability of a participant to manage multiple, simultaneous goals/action steps; and related policies and procedures.		
IIB10	STS	Supervisors utilize training, coaching, observation and monitoring to assure staff are competent to develop participant-focused, reasonable Housing Plans according to program policies and procedures, and that staff are able to determine when the participant's failure to follow through on agreed action steps may be due to the participant's need for more supports versus the need to modify the Plan. Supervisor is available for individual case consultation.		
IIB11	STS	Staff have appropriate experience and training in how to effectively resolve differences, while respecting participant choices, in situations when staff-recommended goals and participant preferences conflict.		
IIB12	PQI	The program conducts periodic audits of case files to assure that staff are implementing policies and procedures, that Housing Plans are reasonable and participant choice is incorporated when developing Housing Plans.		
IIB13	PQI	The program periodically assesses the process for developing and the effectiveness of Housing Plans, including the relevance of Housing Plans to participant needs and program goals, participant satisfaction with Housing Plans, and if or how to improve the effectiveness of and satisfaction with Housing Plans.		
<b>Total</b>				

### III. Participant Services, Non-Financial

#### A. Case Management

##### **Approach:**

Case management is a short-term, individualized intervention focused on assisting the participant to obtain and retain permanent housing. The program uses a progressive approach to case management, whereby case management intensity and duration are provided to all program participants at the lowest level that is effective for the majority of clients—with the flexibility to provide more (or less) case management only if and when a participant demonstrates a need. Case management includes the coordination of services to support participants in achieving their Housing Plan, including coordination of financial assistance, tenancy supports and other resources that are available in the community through homeless assistance, Veterans and mainstream services. Where community resources, services, and housing are appropriate and acceptable to the participant, the case manager provides detailed information about the resources and to the greatest extent possible and assists the participant to self-advocate for access. Program staff includes people who have directly experienced and overcome homelessness and/or other conditions that are experienced by the target population (such as: very low income, reliance on public benefits, history of housing instability/eviction, unemployment and/or chemical or mental health barriers).

	Type	Standards	Fidelity Score (Scale 1-5)	Priority for Improvement (high, medium, low)
IIIA1	PPP	The program has policies and procedures for case management that are consistent with these standards and that describe: the base level (intensity, frequency, and duration) of case management offered to participants; when the level of assistance is adjusted to meet participant needs (within program funding constraints); and how adjustments to assistance levels are made.		
IIIA2	PPP	Case management assistance emphasizes housing and focuses on assisting participants to achieve their housing goals through the most effective, efficient, and acceptable combination of direct assistance and referrals to community resources.		
IIIA3	PPP	Case management assistance is individualized and flexible. The least amount of assistance is provided for the shortest duration of time necessary to achieve Housing Plan goals. When needed, participants are offered more intensive, frequent, and/or a longer duration of case management assistance.		
IIIA4	PPP	The program maintains or has access to an up-to-date directory of community-based and mainstream resources that are most commonly utilized by program participants, including those programs' eligibility requirements and referral procedures; and the program tracks changes in eligibility requirements and/or in referral processes.		
IIIA5	PPP	The program maintains or has access to an up-to-date list or directory of housing options that includes a wide variety of subsidized and market-rate rental housing in various locations across the program's service		



		area, as well as eligibility requirements and referral procedures.		
IIIA6	PPP	Staff are knowledgeable about and assist participants with information, referral, advocacy, and service coordination with a wide variety of other community resources and service systems that participants want and need to assist participants achieve their Housing Plans. This includes knowledge about service eligibility criteria, application processes, referral processes, and contacts.		
IIIA7	PPP	Staff are knowledgeable about and assist participants with information, referral, advocacy, and housing coordination with a wide variety of subsidized and market-rate rental housing options and locations. This includes knowledge about housing eligibility criteria, application processes, referral processes, and contacts.		
IIIA8	PPP	The program has written agreements and procedures with key service and housing partners and referral resources, when appropriate, to facilitate participant referral and service/housing assistance coordination.		
IIIA9	PPP	Participants are referred to all appropriate subsidized housing options, which participants want and for which they may be eligible, even if not immediately available.		
IIIA10	PPP	To the greatest extent possible, participants are assisted to self-advocate for access to community resources, services, and housing, with intervention by case managers when the participant wants and needs assistance.		
IIIA11	PPP	All referrals are voluntary, and made with participant consent, except in cases where reporting or referrals are legally mandated (e.g., in situations involving awareness of abuse, neglect or exploitation of an adult or child).		
IIIA12	PPP	Staff monitor and follow up on successful referrals to ensure services are coordinated.		
IIIA13	PPP	Staff know how and when to close cases, and if/when/how to provide follow-up or re-open a case.		
IIIA14	PPP	Staff, in consultation with the participant, determine when Housing Plan goals have been adequately met and case closure should occur.		
IIIA15	STS	Staff have appropriate experience and training regarding program approach to case management, use of community resources, services, and housing to achieve client housing goals, and related policies and procedures.		
IIIA16	STS	Staff have appropriate experience and training to monitor and recognize the changing ability, needs and interests of participants and modify the intensity, frequency and duration of case management support as necessary.		
IIIA17	STS	Staff providing case management have direct experience overcoming barriers experienced by program participants, such as homelessness, extremely low incomes, a history of housing instability/eviction, unemployment and/or chemical or mental health barriers.		
IIIA18	STS	Supervisors utilize training, coaching, observation and monitoring to assure case management assistance,		

		referrals and service coordination, and case closings are appropriate, effective, and conducted according to program policies and procedures. Supervisor is available for individual case consultation.		
IIIA19	PQI	The program periodically assesses the quality and effectiveness of case management assistance to assure that staff are implementing policies and procedures and to assess program participant satisfaction with case management assistance.		
IIIA20	PQI	The program periodically assesses the use of community resources, services, and housing and solicits feedback from staff and program participants regarding satisfaction with referrals to those sources.		
IIIA21	PQI	The program tracks the types/location/sizes of housing obtained or retained by program participants to identify gaps and the need for other housing options and landlord recruitment.		
<b>Total</b>				

## B. Tenancy Supports

### Approach

The program offers individualized tenancy supports designed to assist participants obtain and retain permanent housing. Participants are provided with tenancy supports, based upon their knowledge, skills, and experience with lease requirements, adequate care of the housing unit, any broad tenant behavior clauses in the lease, as well as support that maximizes participants' ability to pay their portion of housing costs. The program uses a progressive approach to tenancy supports, whereby all program participants are offered a minimum level of support and participants receive more (or less) support only if and when needed.

	Type	Standards	Fidelity Score (Scale 1-5)	Priority for Improvement (high, medium, low)
IIIB1	PPP	The program has policies and procedures for tenancy supports that are consistent with these standards and that describe: the base level (intensity, frequency, and duration) of tenancy supports offered to participants; when the level of assistance is adjusted to meet participant needs (within program funding constraints); and how adjustments to assistance levels are made.		
IIIB2	PPP	<p>The program offers or arranges for comprehensive tenancy supports, including, but not limited to:</p> <ul style="list-style-type: none"> <li>a) Providing mediation assistance to address and resolve conflict with landlord or host family/friend;</li> <li>b) Providing written information about landlord/tenant rights and responsibilities per local and state laws;</li> <li>c) Reviewing and understanding the requirements of the lease;</li> <li>d) Providing or assisting a participant to access legal assistance when tenant rights have been violated or when other legal issues affect housing stability;</li> <li>e) Understanding how to care for the housing unit to comply with the lease, avoid damage and maintain safe, habitable conditions;</li> <li>f) Understanding various subsidized and market-rate rental housing options, application requirements, and processes;</li> <li>g) Applying for various types of subsidized and market rate rental housing;</li> <li>h) Obtaining, interpreting, and correcting, as needed, participant rental and credit history;</li> <li>i) Obtaining identification and other documentation needed to apply for housing;</li> <li>j) Developing a household budget and reducing expenses to the extent possible (which may include relocating to less expensive housing);</li> <li>k) Reducing or re-negotiating debt and/or obtaining other consumer credit counseling assistance;</li> <li>l) Information and referral to free or reduced-cost goods and services;</li> </ul> <p>Information and referral to public assistance and/or employment.</p>		
IIIB3	PPP	Tenancy supports are individualized and flexible. When needed to achieve housing goals, participants are		

		offered more intensive, frequent, and/or a longer duration of tenancy supports.		
IIIB4	PPP	Staff conduct home visits to identify and address tenancy concerns. Teaching tenancy skills is, to the extent possible, conducted in participants' housing units.		
IIIB5	PPP	The program has user-friendly, simple Budget Worksheets for staff and participant use.		
IIIB6	PPP	The program maintains or has access to an up-to-date list or directory of free or reduced-cost goods and services that is shared with participants.		
IIIB7	PPP	Staff assist participants develop a plan for maintaining housing even when a participant may have to pay a high portion of their income for rent and utilities. This may including, but is not limited to, budgeting and money management strategies, use of in-kind resource/supports, and increasing participant knowledge of free or low-cost goods and services, as well as emergency assistance if and when a participant is unable to pay rent or utilities.		
IIIB8	STS	Staff have appropriate experience and training in program approach to tenancy supports, including: landlord-tenant rights and responsibilities; care of housing unit; communication/conflict management; standard lease provisions; various subsidized and market-rate rental housing options; developing housing plans that maximize participant's ability to pay portion of rent as is reasonable and/or required; basic budgeting strategies to help participants reduce expenses and increase the use of free or reduced-cost services and commodities; other tenancy supports; and related policies and procedures.		
IIIB9	STS	Supervisors utilize training, coaching, observation and monitoring to assure staff understand and can apply tenancy supports to their caseload, including providing support during home visits. Supervisor is available for individual case consultation.		
IIIB10	PQI	The program periodically surveys program participants and landlords to identify their satisfaction with tenancy supports and to solicit recommendations for improvement.		
IIIB11	PQI	The program tracks the situations that caused their clients' imminent literal homelessness to identify any gaps in staff skills or opportunities to work with community institutions to prevent discharge of clients without appropriate housing plans.		
<b>Total</b>				

## IV. Participant Services, Financial

### Approach:

The program offers time-limited, individualized financial assistance designed to assist participants obtain and retain permanent housing. Financial assistance is provided at a level that enables participants to maintain housing **while** they seek to: increase income; relocate to less expensive housing; obtain a longer-term subsidy; and/or reduce expenses to sustain their housing. Financial assistance is as minimal in amount and duration as possible and provided in a manner that is intended to avoid an immediate or near-term loss of housing. *The program recognizes that the long-term ability of a participant to pay housing expenses is not the responsibility and may not be within the control of the program.*

	Type	Standards	Fidelity Score (Scale 1-5)	Priority for Improvement (high, medium, low)
IV1	PPP	The program has policies and procedures for financial assistance that are consistent with these standards and that describe: the amount and duration of financial assistance by type (rent, utility, security deposit, etc.); the participant share of rent and utility costs; when the level of assistance is adjusted to meet participant needs (within program funding constraints); and how adjustments to assistance levels are made.		
IV2	PPP	The program provides the least amount of assistance for the shortest duration of time necessary to address the immediate housing need and prevent a near-term recurrence of the housing crisis.		
IV3	PPP	The amount and duration of financial assistance is adjusted according to participant needs. As needed and when appropriate, the program offers the maximum amount and duration of financial assistance within program funding constraints to assist participants with little or no income.		
IV4	PPP	Rental assistance is reviewed on a routine (specified) schedule and when/if participant income or rent changes.		
IV5	PPP	The program encourages participants to develop an emergency savings account to address future financial crises that might affect housing stability, including ways to protect and grow their savings.		
IV6	PPP	Financial assistance is provided in a manner that is intended to prevent participants from experiencing a sudden and unmanageable increase in their housing expenses at the end of program assistance.		
IV7	PPP	The program has defined when supervisor approval for financial assistance is needed (e.g., in cases where the level or duration of subsidy exceeds agency average or maximum).		
IV8	STS	Staff have appropriate experience and training in the program approach to financial assistance, financial assistance options and limitations, calculating and monitoring rental assistance, and related policies and procedures.		
IV9	STS	Supervisors utilize training, coaching, observation and monitoring to assure staff competency in assessing,		

		calculating, monitoring and adjusting financial assistance. Supervisor is available for individual case consultation.		
IV10	PQI	The program has utilization review procedures for tracking financial assistance and assuring assistance levels are appropriate and effective.		
IV11	PQI	The program periodically surveys program participants and vendors (e.g., landlords) to identify their satisfaction with financial assistance and to solicit recommendations for improvement.		
<b>Total</b>				

## V. Landlord Supports

### Approach:

The program proactively develops relationships with landlords and offers support to the participant and the landlord to assure participants obtain housing and landlord needs are met. Programs recruit landlords and develop agreements that specify the type and duration of supports to be provided by the program to the landlord. The program uses a progressive approach to landlord supports, whereby all landlords are offered a minimum level of support and landlords receive more (or less) support only if and when needed.

	Type	Standards	Fidelity Score (Scale 1-5)	Priority for Improvement (high, medium, low)
V1	PPP	The program has policies and procedures for landlord supports that are consistent with these standards and that describe: the base level (intensity, frequency, and duration) of landlord supports offered to landlords; when the level of assistance is adjusted to meet landlord needs (within program funding constraints); and how adjustments to assistance levels are made.		
V2	PPP	The program actively recruits and supports landlords who are willing to rent to program participants, including participants with significant tenant screening barriers.		
V3	PPP	The program has written agreements with landlords that specify how and when staff, participants, and landlords will communicate regarding lease concerns and program supports the program will provide to landlords and to tenants, including the amount and duration of rental assistance.		
V4	PPP	The program offers various supports to landlords to meet landlord needs and support participant tenancy. These may include, but are not limited to: <ul style="list-style-type: none"> <li>a) Providing contact information for landlords to reach staff, if and when a concern arises related to participant lease compliance;</li> <li>b) Additional security deposits and/or last month's rent for high-barrier clients;</li> <li>c) Mediating disputes in order to resolve landlord/participant concerns;</li> <li>d) Follow-up support to address landlord/participant concerns after case closing;</li> <li>e) Co-signing leases;</li> <li>f) Paying for or facilitating relocation to other housing;</li> </ul> Paying for or repairing damages.		
V5	PPP	Staff intervene in a timely fashion in situations where a landlord indicates the participant has violated the lease or is the subject of a significant complaint.		
V6	STS	Staff have appropriate experience and training in program approach to working with landlords, understanding landlord needs, managing conflict, negotiation skills, responding to landlords who fail to meet their obligations, and related policies and procedures.		

V7	STS	Supervisors utilize training, coaching, observation and monitoring to assure staff are responsive to landlord needs and requirements and can fairly balance landlord and tenant rights and responsibilities. Supervisor is available for individual case consultation.		
V8	STS	Supervisors are available to intervene and negotiate when there is an impasse between staff and a landlord.		
V9	PQI	The program periodically surveys landlords to identify their satisfaction with landlord supports and to solicit recommendations for improvements.		
<b>Total</b>				



## Appendix

- A. Example: Template for Summary of Fidelity Progress and Action Steps
- B. Example: Chart of Fidelity Progress

## Template: Quality Improvement Plan

Program Name: \_\_\_\_\_

Plan Date: \_\_\_\_\_

	[Assessment Date]	[Assessment Date]	[Assessment Date]	[Assessment Date]	[Assessment Date]
<b>Standards Category I:</b> <i>Outreach, Engagement, and Admission</i>	[Total Score]	[Total Score]	[Total Score]	[Total Score]	[Total Score]
<b>[GOAL]</b>	<b>Task</b>		<b>Completion Date</b>	<b>Responsible Party</b>	
	1.				
	2.				
	3.				
	4.				
	5.				

## Sample: Chart of Fidelity Progress

